Buddy Coaching Guidelines –2024

Buddy Coaching Guidelines

Your opportunity to really apply what you are learning in your Wellness Mapping 360°™ course begins with your buddy coaching experience. If you have never coached before this is your introduction into health and wellness coaching and the Real Balance methodology will provide you with a solid framework to develop your skills. And if you are already an ICF coach or a health coach on staff with a wellness or other program, buddy coaching is your opportunity to practice integrating the Real Balance methodology and tools into your coaching.

Buddy coaching is NOT role-playing. The focus of your buddy coaching should be around a real health/wellness topic or concern. However we recommend that you do not choose a topic that is highly charged for you as the client.

What's Required

Complete the ***Buddy Coach*** Notes for each buddy coaching session. Submit all 6 buddy coaching sessions via the Real Balance file Transfer process: https://realbalance.com/file-transfer. You may submit buddy coaching sessions one at a time, 2-3 together or all together. You must put YOUR name under name on the Coach Notes.

Get Started

Begin your buddy coaching any time after the class has covered Class #9 *Wellness Mapping 360 Assess and Explore.* By Class #9, the course will have covered basic coaching skills, readiness for change and the beginning of the Real Balance methodology. The rest of the methodology will be covered and explored ahead of your application of them in buddy coaching. We recommend that you contact your buddy coach as soon as possible after the course begins to determine dates and times that will work well for both of you.

How Much

The requirement is **six one-hour buddy coaching sessions**: 30 minutes coaching and 30 minutes being coached. You and your buddy coach may want to extend the length of each session. We recommend that you begin with 30 minutes each way. If you discover that you want to extend the session length, co-create an agreement with your buddy coach for a new length of time and stick to that time commitment. We recommend that you learn how to do 30 minute sessions.

This is an opportunity to work within a defined amount of time, to experience how well that works for you, what needs to change and co-creating agreements around time.

Completing the Buddy Coaching Form

Always enter <u>YOUR</u> name in the Buddy Coaching form, not your 'client's name, and the session number along with the date of the session. Enter the client commitment in sessions 2 – 6. Identify what was the agreed session focus (discovery, creating the plan or another focus identified by the client.)

Coach Notes	Name:		Date:
Client commitment/agreement from <u>previous</u> session (taken from last week's progress notes):			
Client stated direction or agenda for <u>this</u> session (direction for discussion based on client's current agenda):			

In the ***Progress Notes***: include how you connected (greeting) with your client and what you reviewed with them in the check-in. Identify tools that that you reviewed in the session or that the client completed prior to the session. Identify any challenges that your client has identified and any opportunities that your client has identified or that you identified with your client (e.g. strengths, values, support). Include what accountability you set up with the client and any exploration of support.

	Progress Notes
Connect / Review	
Tools / Techniques	
Opportunities	
Challenges	
Accountability	
Support	

In the ***Client Commitment /Agreement*** section, identify the client's commitment to action. In the ***Review/Evaluation*** section, summarize the focal points of the session and key points of your self-observation (e.g., what felt comfortable, what worked well, what did not, how might you coach differently in the next session).

Client commitment / agreement for next session:
Review / evaluation (key points from session, what worked and what did not, modifications for next session, etc.):

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Be a Pro
You have been paired with a buddy coach with whom you do not have any personal or professional relationship. Treat you buddy as a real "client" during coaching. Once the buddy coaching ends, you may want to share feedback with one another with your 'student' hat on to enhance your learning experience. Use separate time to discuss the class, wellness coaching or common interests.

Focus on Lifestyle Improvement
While all aspects of life are wellness, we're really focusing on lifestyle behavior change in this course. As the 'client' examine your own PWF (Personal Wellness Foundation) and see where you need to grow. Remember it may or may not be about the physical side of things. Managing stress, developing more connectedness, more of a spirituality practice or more meaning and purpose in your life work all make great things to explore too. Remember to begin with exploration. Facilitate your client's exploration.

Practice What You Are Learning
Continually take what we are working on in class, covering in the book and in the manual and apply it in the buddy coaching. Begin with where your client is right now through discovery and have your client complete the ***Welcome Packet***. This could be done before the first session and provide coach and client with a starting point for the coaching conversation. In the first or second session, you and your client may identify something that the client can begin to do right away even though you are in discovery and have not developed the coaching plan or map yet. Initial action steps may be completing an assessment tool or trying out another action your client chooses.

Help your client begin with the end in mind – and identify their ***Well Life Vision*** and then what ***Area of Focus*** they would like to work on towards their well life vision. Work with your client to identify his or her ***Readiness for Change*** for the selected area of focus.

Next identify how they will get from where they are to where they want to get to with the ***Wellness Plan/Map***. Help your client develop one or two SMART (Specific, Measurable, Attainable, Relevant and Time Based) goals and then one or two SMART action steps towards the goal(s) for each area of focus. Remember to help your client develop goals and action steps that are in sync with their readiness for change. You may not be able to help them work on their plan through to completion in the few weeks you have together, but it may be a great service just helping them set up one that they can continue to work on with the support of their support community.

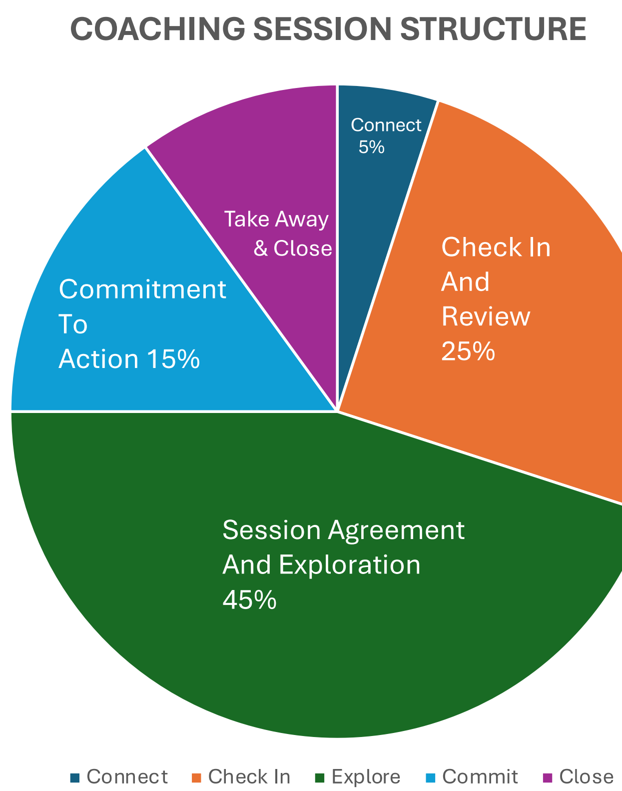
Look at **accountability** with your client. How will they know that they have done what they committed to do? Explore tracking as a way to set-up loop hole free accountability. Explore what **support** is needed, what support is in place and what needs to be created.

In the last coaching session you may want to explore with your client what **outcomes** have been accomplished. In six sessions that may simply be the development of their vision and a plan – and that's a lot! You may also explore their takeaways from the coaching session(s) and how they will move forward on their own.

Do the Best You Can
Be fully present and bring your authentic self into the buddy coaching as coach and as client. Give it your best, and realize that for both you and your buddy, it's OK to be where you are at... the beginning! Be understanding with your buddy coach and be the best client you can be.

Practice Using a Session Structure

A well-constructed coaching session can save time, define a point of focus and for both client and coach, educate the client on how to prepare for and approach the session, and facilitate both learning and forward action. This is a general recommendation. Your coaching session may not be able to be divided so precisely.



Connect: Greet your client, getting totally focused on the client and apply active listening to tune into where he/she is: client's presence, mood, concerns. This is a great place to set-up the session by asking your client:

- What do you want to focus on today?
- What do you want to accomplish or walk-away with at the end of the session?

Check in and Review: This is the **check-in**. Except for the first session, practice including it in each session. How did your client do with their commitment to action from the prior session? You may also want to experiment with the ***Coaching Call Prep Form***. If you and your client use this form, you still want to name what was done or not done since the last session. As the coach you want to find something positive to acknowledge, even it's the fact that your client is back and committed to their vision.

Session Agreement and Exploration: Focus on the topic the client has identified as the focus for the coaching session. When it includes initial discovery or developing the plan, remember these are essential components to moving forward. You may want to explore with the client what they see as the takeaway from the session or highlight any aha moments. If the client's action steps include completing tools, explore their experience with the tools and what they noticed in completing it. If the client is taking other kinds of action steps from the Plan, you may explore challenges or opportunities, support, brainstorming, exploring different perspectives, helping the client identify or reconnect with their motivation/vision and strengths. The gremlin may appear at any point. As soon as a client begins truly moving forward (which can simply be putting the plan together) that gremlin voice can begin to get quite loud and chatty. Identifying and addressing the presence of the gremlin may become a focus of exploration even early in the process.

Commitment to Action: Practice ending each session with a **request for action and exploration of accountability**. The action may be something new (e.g. completing the next tool towards creating a plan, or a discovery tool such as the connectivity scale) or a revised action step or the same action step from the prior session. Accountability includes the check-in at the next session. It may include something else that is important for the client such as tracking tools, journaling, using a buddy to complete the action step, using a co-worker or family member with whom to check-in.

Take Away and Close: If you and your client will continue discovery or working on creating the plan in the next session, name it and be sure that you and your client are clear and in agreement about what is next. Don't assume that your client will take action just because it has been discussed. Restate the client's action commitment and verify with them their agreement to do it. This is also where you can review the commitment for the next session – date and time. This is a nice opportunity to acknowledge your client in some way – their strengths, their commitment to themselves and their well life, their progress; or a statement/reminder of something that the client finds inspirational.

Especially if you are just beginning your journey as a coach, hitting all pieces of the session structure may be challenging. <u>If nothing else practice these three</u>:

1. The check-in at the beginning of the session.

2. If in discovery or plan development, identify what part of discovery or the development of the plan you and your client have agreed to focus on in this session. If the plan is in progress, ask your client to identify a specific focus for the session.

3. Request action and identify accountability at the end of the session.

Optional - Six Session Guidelines

These are suggested focus points and a building structure for the 6 sessions that will give you experience with the Real Balance methodology. You and your client may move faster or more slowly. Or you and your client may want to use tools in a different order or in some cases use discussion in lieu of specific tools. No need to be rigid – make this the best possible learning experience for you and your buddy. This is not intended as a script to follow but more as *recommended guidelines* for maximal learning.

Buddy Coaching Session 1

Focus:

Core Coaching Skills: Setting the Foundation and Establishing Agreements
Real Balance Methodology: Assess & Explore - Begin Discovery - Create the Alliance
As the Coach:

- Clarify what coaching is and isn't and your definition of wellness coaching and your role as coach.
- Practice listening to, for and with.
- Begin to develop your own personal wellness foundation.

As the client:

- Tell your story.
- Think about what you want to create in your own wellness journey.

For both coach and client:

- Identify where the client is right now
- Identify any concerns or questions the client has
- Identify the client's strengths, values and past learning from experience, current state of health.
- Identify what the client wants to create for their well life.
- Co-design agreements and how best to coach the client.
- Is there an action step that the client would like to take right now?
- Identify an area of focus for the coaching – if time. Another possibility is to request the client to complete a tool to continue this exploration in the next session). If the timing is not right to begin this – leave it to the next session.

Possible Tools: (sent ahead of the first session, following the first session as homework or discussed in session)

- The Coaching Value Proposition (handout)
- The Welcome Packet
- A Strengths Inventory
- A Values Clarification Inventory or exercise
- Introduction of the Wheel of ……. (Life, Satisfaction with Connections, Life Balance, Nutritional Satisfaction, Physical Satisfaction) or co-create a wheel.

Buddy Coaching Session 2

Focus:

Core Coaching Skills: Co-Creating the Relationship – Coaching Presence (Continue Setting the Foundation and Establishing Agreements)
Real Balance Methodology: Assess & Explore – Continue Discovery / Introduce Exploration of the Area of Focus

As the Coach:

- Begin incorporating the session structure
- Don't rush
- Do move the discovery along – but don't push to complete specific items
- Explore having your client complete tools as homework (their commitment to action)
- Listen to your intuition

As the client:

- Think about where you are and where you want to get to – what results you want to arrive at.
- Think about the wealth of your experience and how you can use it.
- Think about what is most important to you right now and your priorities.
- Think about what is really – no kidding – doable right now.
- Think about what are your hopes and fears for coaching.

For both coach and client:

- Completing discovery and agreements.
- If time, begin to explore identifying the area of focus.

Possible Tools: (following the session as homework or discussed in session)

- Continuation of tools from Session One
- Introduction of the Wheel of ……. (Life, Satisfaction with Connections, Life Balance, Nutritional Satisfaction, Physical Satisfaction) or co-create a wheel.
- Readiness for Change – (If client is ready to explore this – see Session 3)

Buddy Coaching Session 3

Focus:

Core Coaching Skills: Communicating Effectively (Continue Co-Creating the Relationship – Coaching Presence)

Real Balance Methodology: Assess & Explore – Explore the Area of Focus and Readiness for Change. If time, begin to explore the Well Life Vision and Plan/Map

As the Coach:

- Continue to incorporate the session structure – if the client has committed to take action in the last session do a check-in around that.
- If you have not begun to explore the area of focus – begin now.
- If you have explored the area of focus, now explore the client's readiness for change for that area of focus.
- Remember, readiness is not determined by a score on the RFC tool.
- Use the RFC form as a point of discussion – e.g. "what would make a score of 3 a 4?". Despite the score – what the client think their level of readiness is?
- Use active listening and powerful questions (questions that serve the client's learning or forward movement - not just your general curiosity).

As the client:

- Be honest with yourself.
- Looking at your readiness for change – is this the right time to begin with this area of focus? Do you have the time and resources to do it now? Or should you consider another area of focus?
- Beginning at your true readiness for an area of focus that is appropriate for right now will put you on the path to success.

For both coach and client:

- Explore this thoroughly to ensure that both the area of focus and readiness for change feel right from the client's perspective.
- Challenge any' iffy-ness'.

Possible Tools: (following the session as homework or discussed in session)

- The Wheel of ……. (life, Satisfaction with Connections, Life Balance, Nutritional Satisfaction, Physical Satisfaction) or a wheel co-created with the client
- Readiness for Change
- Well Life Vision Tool (If client is ready to explore this see Session 4)

Buddy Coaching Sessions 4 & 5

Focus:

Core Coaching Skills: Communicating Effectively & Facilitating Learning & Results (Continue Co-Creating the Relationship – Coaching Presence)

Real Balance Methodology: The Wellness Plan - Design the Well Life Vision and Plan/Map – Identify any Desired Goal Outcomes - Begin taking action defined in the Plan – Set up Accountability for the plan - Explore Support

As the Coach:

- Continue to incorporate the session structure and to use active listening and powerful questions
- If you have not begun to explore the Well Life Vision and Plan – work with your client on it now.
- Help your client assess goals and actions steps that are SMART or MAP
- Explore if goals and actions steps are both relevant to the area of focus and in sync with client's readiness for change.
- Identify what outcomes the client wants to accomplish when the goals have been met.

As the client:

- Be honest with yourself.
- Consider if the goal itself calls you forward or if it feels unappealing or hard to accomplish.
- Consider if you are trying to 'bite off more that you can chew' with your goal(s) and action steps.
- Think about what forms of tracking either appeal to you and/or you are willing to try.

For both coach and client:

- Discuss the plan as real and experimental at the same time – not cut in stone.
- Discuss tracking or journaling (as appropriate) or discuss what would be an appropriate way for the client to be aware if they are doing their action step (sometimes an actions step is not trackable in the conventional sense).
- Explore any perceived challenges and how they might be addressed.
- Explore what support is needed, what support is in place and what is still needed.

Possible Tools: (following the session as homework or discussed in session)

- Well Life Vision Tool
- Integrated Plan tool
- Real Balance Tracking tool or other tracking device

Buddy Coaching Session 6

Focus:

Core Coaching Skills: Communicating Effectively & Facilitating Learning & Results (Continue Coaching Presence)
Real Balance Methodology: Explore the beginning of the Journey – Evaluate and Identify Outcomes
As the Coach:

- Last check-in.
- Continue exploration from last session.
- Save some time at the end to summarize with the client what was done over the last 4 sessions.
- Ask your client what they see that they have accomplished (current outcomes may include having a clear plan, a vision, a new awareness).

As the client:

- Consider what it will take to continue on your own.
- Celebrate!

For both coach and client:

- Explore how client will continue with their plan on their own.
- Explore the client's take-away from the coaching.
- Celebrate!

Sharing and Feedback (Optional)

Once the last buddy coaching session is completed, this may also be an opportunity to share feedback with your buddy. Ideas for feedback:

1. What did you appreciate about the coaching - as client and as coach?
2. What worked well for you as a client?
3. What you would have liked more of or less of – as a client?
4. What felt especially challenging for you as coach and what shifted for you over the 6 sessions?